



State of Montana Project Management Office

Project Delivery and Closure Phase

Lessons Learned Meeting Agenda Instructions

An example agenda for a half-day lessons learned meeting at the end of a project (sometimes called a Project Closeout Meeting). It includes:

- who should attend
- meeting objectives
- meeting deliverables
- agenda items, showing a suggested sequence of team discussion, brainstorming and analysis by which the team can agree upon what went well on the project, what didn't and what should be done differently next time.

The only way to avoid problems happening yet again in the future is carefully consider what went wrong and why, and make sure there is a way to transfer related recommendations forward. Likewise, teams can help others repeat their successes only if they somehow can express concretely what went well and why. The specific lessons and recommendations generated in this kind of meeting will yield concrete actions for other teams.

1. Edit the example agenda subjects to reflect any specific areas or descriptions of what your meeting should cover. Adjust the timeslots for a longer or shorter meeting, depending on your project and how much discussion you think will be needed.
2. Adjust the attendee list to include specific names and their departments/functional groups to help ensure that you're inviting everyone that should be there.
3. Check this draft invitee list with your core team and solicit ideas for who else should be invited. Often team members will think of key individuals who might have been a heavy participant at some point, with valuable information to relay. For instance, "We should invite Joe. He had to deal with all those problems in production; he'll be able to talk about impact and what we should have done differently in the design."
4. Allow enough time ahead of the meeting to allow the project manager and others to gather or compile information for reference. For example, during the first part of the meeting, the team reviews the original planned major milestone dates vs. the dates those milestones were actually achieved. That information should be brought to the meeting rather than creating it from memory on the spot.

5. Send out the agenda with appropriate statements about the importance of attendance by all invitees and expectations about 'tone' and spirit of the meeting. (Specifically, lessons learned meetings must be objective and professional – no “blame games” allowed.)

Administrative Information

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